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**Course Title:** Microsoft Dynamics CRM 4 Administration

**Objectives:** This two-day course, Administration in Microsoft Dynamics CRM 4.0, provides students with the necessary techniques to plan, develop, apply, and examine administrative tasks within Microsoft Dynamics CRM 4.0.

After completing this course, students will be able to:

- Configure the organizational structure in Microsoft Dynamics CRM
- Configure security, users and teams, and organizational settings
- Manage change
- Configure reporting options
- Optimize performance
- Use Advanced Find

**Who should attend:** This course is intended for people who plan to install, implement, configure, or support Microsoft Dynamics CRM 4.0. The course is intended for administrators, implementers, developers, and consultants who need to understand the technical aspects and administrative functionality of Microsoft Dynamics CRM. The course is not intended for non-technical staff.

**Duration:** Two days

## Course Content

- **Business Units**
  - Create new business units
  - Change a parent business unit
  - Disable a business unit
- **Configuring Security**
  - Privileges
  - Access Levels
  - Roles
  - Creating roles in business units
  - Assigning roles to users
  - Resolution of conflicting privileges
  - Copying roles
  - Security best practices
- **Configuring Users and Teams**
  - User management overview
  - Microsoft Dynamics CRM User Management
  - User Manager Wizard
  - Team Management
- **Configuring System Settings**
  - Configure Multi-Currency Exchange Rates
  - Install Multilingual User Interface (MUI) Language Packs
  - Enable and use duplicate detection
  - Create data maps
- **Change Management**
  - Change Management Principles
  - Planning Changes
  - Executing Changes
  - Testing Changes
- **Report Customizations**
  - Reporting and Microsoft Dynamics CRM
  - Reporting Features
  - Creating Basic Reports
  - Display and categorization options
  - Controlling access to reports
- **Creating Reports**
  - The Report wizard
  - Export to static Excel
  - Export to dynamic Excel
- **Performance and Maintenance**
  - Hardware Requirements
  - Outlook Client Performance
  - Report Performance
  - System Performance Optimization
  - E-mail Router Optimization
  - Database Performance
  - Best Practices
- **Advanced Find**
  - Personal Views and Exports
  - Best Practices